



CARLISLE ENERGY TASK FORCE

Town of Carlisle, Massachusetts, MA 01741

Carlisle is a 'Green Community' of Massachusetts

MINUTES OF MEETING: 6th February 2019 at 7.00pm Town Hall

Present: Bob Clarke, Basu Sarkar, Bill Risso, Bob Zogg

Absent: Dan Cook, Debbie Bentley, Helen Young

Attendee: Jonathan DeKock, Claude Von Roesgen, Janne Corneil (Chair, Master Plan Steering Committee)

Bob Zogg called the meeting to order at 7.11pm.

It was agreed that the meeting can be live-streamed on You Tube.

Bob Z. recorded meeting minutes in the absence of the secretary.

Minutes for January's meeting were approved, as amended, with one abstention.

Current Business

		Discussion	Action
1	1	Carlisle Master Plan Janne Corneil presented an overview of the new master plan development process, and how the Master Plan Steering Committee estimated resource requirements for a consultant to assist the MPSC in gathering community input for the new master plan. The MPSC seeks CETF's endorsement of their warrant article to request \$150K - \$160K for hiring a consultant. Janne's presentation is attached.	
	2	Presentation Notes: <ul style="list-style-type: none">• Presentation is attached, and also available on website: https://www.carlisleplan.org/• Master Plan will be a living document• Process is as important as the plan itself• Janne develops master plans as her occupation• Master plan process will save money in other areas—examples: GIS system will be upgraded, some planning processes are required by law anyway• Zoning is a major tool in master plans. Also, private/public partnerships.	
	3	Q&A/Comments: <ul style="list-style-type: none">• Q: Nature of community input? A: Community-wide meetings, consultants will help solicit participation (surveys, website info, communication blasts, etc.). There seems to be a lot of interest. Consultant needs to demonstrate ability to solicit input.• Q.: How do we come to consensus with competing priorities? A: Fact finding is first phase of process—will be fact/data-driven process. Second Phase is iterative, with some set of criteria to evaluate aspirations. Goal is to develop process. Janne's experience indicates that most people eventually get behind the plan.• Q/Comment: Balance of niceties vs. necessities? Not much \$\$ left after necessities. Also, what about revenue sources other than the taxpayer?	



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		<p>Plan should be reviewed yearly. A: Consultant will help us develop implementation approach. Plan has several pieces. Plan will be flexible to make tradeoffs.</p> <ul style="list-style-type: none"> • Comment: Town has to be able to afford to implement plan. Reply: agreed • Comment: People come to Carlisle for a few years, commit to spending, and then leave with the burden left on others. • Q: What about grants to help fund the consultant? A: There are places to look for grant money, including MAPC. Boxborough hired MAPC. MAPC co-funded the plan. Haven't found grant opportunity for full-on master plan. • Comment: Plan not voted on at Town Meeting, but approved by BOS • Zoning is a major tool in master plans. Also, private/public partnerships. 	
	4	<p>Vote: Bill requested deferring vote on endorsement of the warrant article until the March CETF meeting to allow time to review and reflect. Action: Place vote on March agenda.</p>	BZ
2	1	<p>Meeting Management (Bob Z.) Bob apologized for the length of the January 2 meeting. Going forward, he encouraged members to:</p> <ul style="list-style-type: none"> • Comment during meetings if they have any concerns or suggestions about meeting facilitation • Review and comment on draft agendas that are circulated in advance • Arrive promptly so that meetings can start at 7 PM • Review the previous meeting's draft minutes, and send comments to the secretary, in advance of the meeting. 	All
3	1	<p>Carlisle Annual Report Bob Z. reported that no member responded to his request for a volunteer to draft an entry to the Carlisle Annual Report. (Entries are due Feb. 28.) Bob repeated the request, but no one volunteered. Therefore, the CETF does not plan to submit an entry</p>	
4	1	<p>Green Communities Bill and Claude provided status updates:</p> <ul style="list-style-type: none"> • School lighting is done • School HVAC—75% complete (small project) • DPW is done • Guardian Projects: <ul style="list-style-type: none"> ○ Town Hall—need form from Tim before starting work—Bill to follow up. ○ Gym Destrat Fans—interested, but haven't set up date to visit school • Charging Stations: No progress. Claude gave Ferns (Matt Herwick) application form. He gave form to Ms. Daisy (property owner) but she or her son lost the form. Claude re-sent form. Debbie created application and submitted for the Historical Society. Building Commissioner says no 	BR, BZ



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		<p>site plan review is needed.</p> <ul style="list-style-type: none"> • Anti-idling: Done. • Bob Z will initiate discussions with Neal Duffy of DOER about using leftover funds for the anti-idling project for the Gym Destratification project. 	
5	1	<p>Municipal Solar</p> <p>Bob C. and Jonathan provided updates:</p> <ul style="list-style-type: none"> • Jan 29—working group had second meeting with Ameresco. Going more slowly than Bob would like at Ameresco end in terms of addressing changes. They've been to planning board and school board meetings. Two leases needed—one for each site. Bob suggested a minimum payment be specified in lease. Need pilot and solar bylaw—they are in process. Still need final design and rendering. Still need to get committee support. Bill suggests explaining to assessors what the pilot is about. Bob doesn't want to meet with boards without complete information. School committee voting Feb. 11? on general concept, but won't be final say. School wants parking lot paved, but that may eat up much/all of lease money. School wants another contractor, not Ameresco, to pave lot. • Jonathan: Ameresco assumed some trees could come down for canopy. Ameresco is revising plan each time they see DPW. May not be able to build this summer if there are more delays. • BOS expects warrant articles on Feb. 12. Three warrant articles are needed: Solar bylaw, lease, and pilot • Bob C. will ask Tim Goddard to authorize him and Jonathan to directly engage with Ameresco. • Ameresco assumed system would be painted. Going with husky blue for first rendering. 	BC
6	1	<p>Goals Subcommittee</p> <p>Bob Z. reviewed updates to draft slide presentation on goals (see attachment). Key comments:</p> <ul style="list-style-type: none"> • The purpose the purpose of this effort is to determine the community's interest in establishing and pursuing goals. • Added agriculture estimate. Agriculture emissions estimate is uncertain due to wide discrepancies in dairy cow emissions. Could be anywhere from 1% to 4% of town's emissions, just for the estimated 140 dairy cows at Great Brook Farm. • Updated residential vehicle emissions after discovering MAPC vehicle use database. • Added waste incineration emissions estimate (incineration at Wheelabrator plant in North Andover). Did not credit emissions for electricity generated. That might lower estimate by 15% or so. • Based on feedback at the January 2 CETF meeting, added alternative program management options and estimated costs. 	



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2	<p>Members offered comments:</p> <ul style="list-style-type: none">• If the idea is to figure out how to solicit community input, rather than to get the opinions of the CETF, then we cannot claim any CETF endorsement of the goals and related support requirements• Several attendees felt that it may be feasible to set and pursue goals without taxpayer funding to manage the effort. Examples:<ul style="list-style-type: none">○ Set up challenge and report progress towards goals to motivate people; perhaps also initiate home energy scores○ Provide installers (selected through a solicitation) with access to our community in exchange for some concession, such as payment to town (to offset management costs) or reduced price to community members○ Policy measures, such as requiring all new construction to be net-zero• Could also consider part-time person, perhaps ramping up hours over time, if needed <p>We should present this to the BOS at some point, to inform them of what we are doing in support of the master plan process. Also, this might help answer some of the questions the Selectmen had about our new mission statement (from the Nov. 27, 2018 BOS meeting).</p>	
7	<p>1 HeatSmart Transition</p> <ul style="list-style-type: none">• Bob Z. had to randomly select a new recipient of the free heat pump because original winner of drawing refused the heat pump (due to cost adders needed to address his aesthetic concerns).• Bob continues to meet bi-weekly with Concord and Lincoln to plan heat pump promotion and information dissemination. Scope includes space heating and water heating.• Concord to host information, but still working out details.• Concord town management has expressed concerns about having volunteer coaches and/or ambassadors, but this is still under discussion.	

Next Meeting 6th March at 7pm. **Meeting Adjourned** 9:27pm.

Attachments:

- MPSC Report_02-06-2019 ETF.pdf
- Carlisle Sustainability Goals--v0.8.pdf

Sustainable Carlisle

DRAFT

Presentation
to XXX
by the Carlisle Energy Task
Force

Feb. 6, 2019 Revision

Introduction

DRAFT

The CETF is helping the town develop goals and a conceptual pathway for energy sustainability.

- CETF established a Goals Subcommittee to:
 - Propose energy sustainability goals and conceptual pathway to achieve goals
 - Work with Planning Board and Master Plan Steering Committee to get community input and incorporate appropriate goals into the new Master Plan

The Benefits

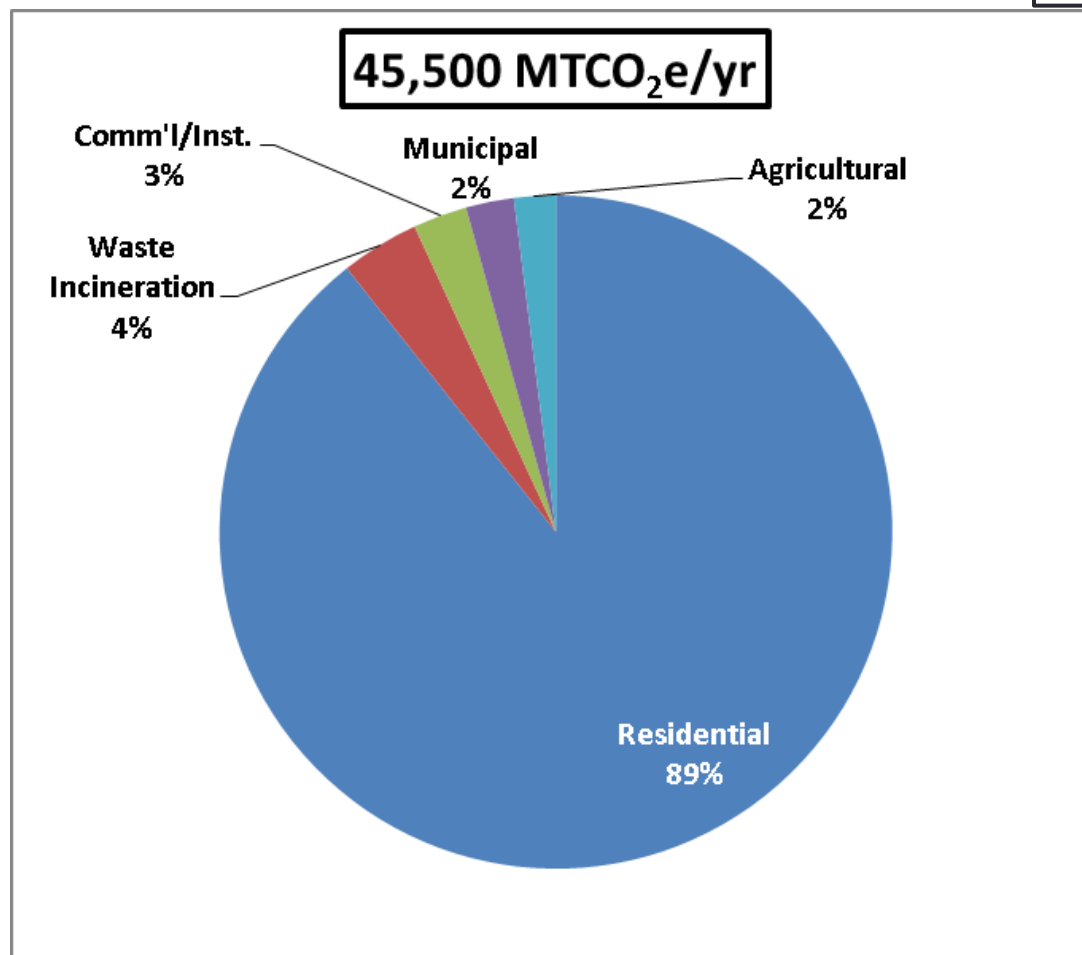
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Setting goals will help Carlisle reduce its environmental footprint.

- Helps residents, businesses, and municipal departments lower energy costs and reduce environmental impacts
- Improves comfort of homes and buildings
- Leaves a healthier planet for future generations



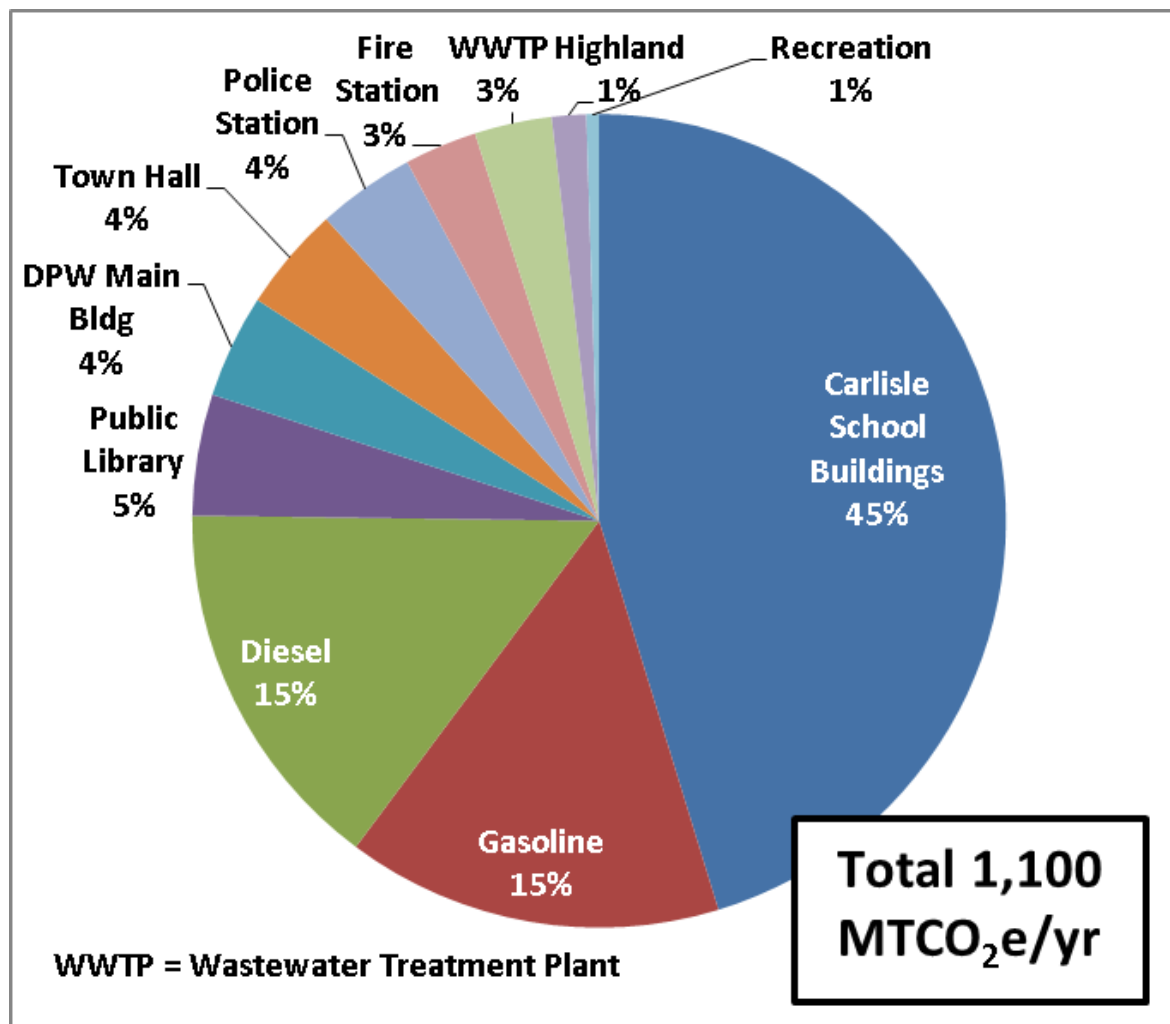
2017 Carlisle Emissions ¹ DRAFT



1) Includes vehicles; excludes indirect emissions associated with purchased goods and services

PRELIMINARY DATA--DO NOT CITE

2017 Municipal Emissions

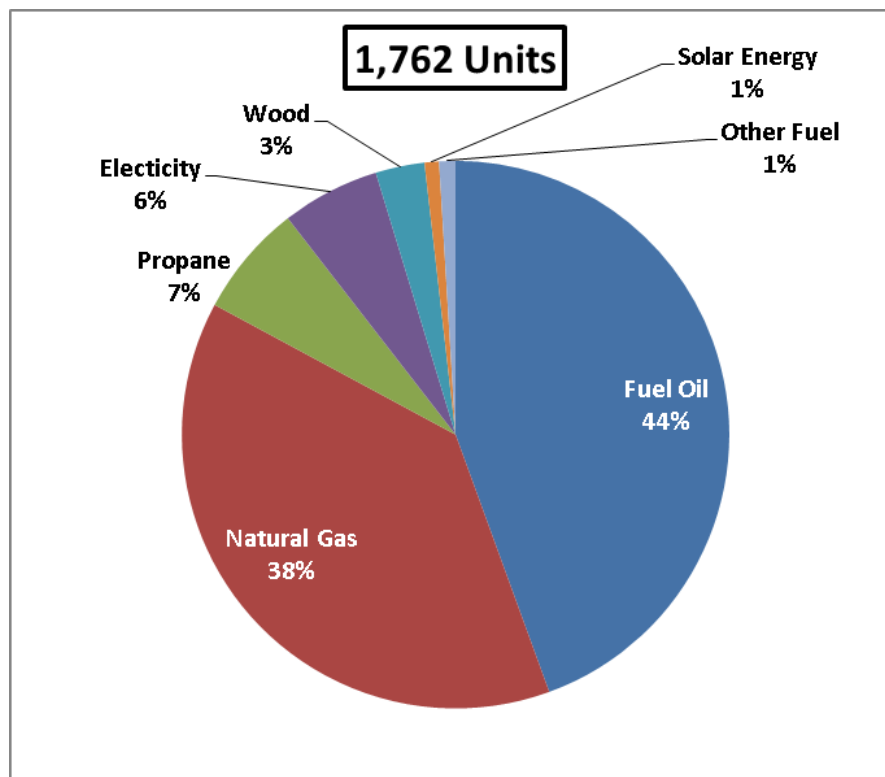
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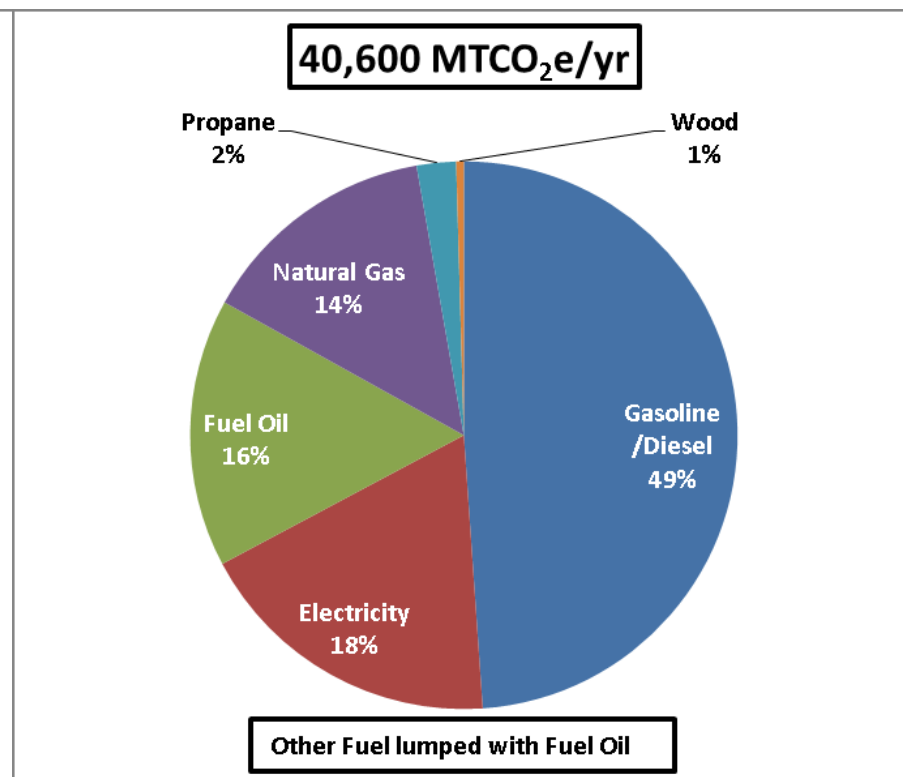
Residential Emissions

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2016 Occupied Housing Units by Primary Heating Fuel



2017 Residential Emissions by Fuel Type, Including Vehicles

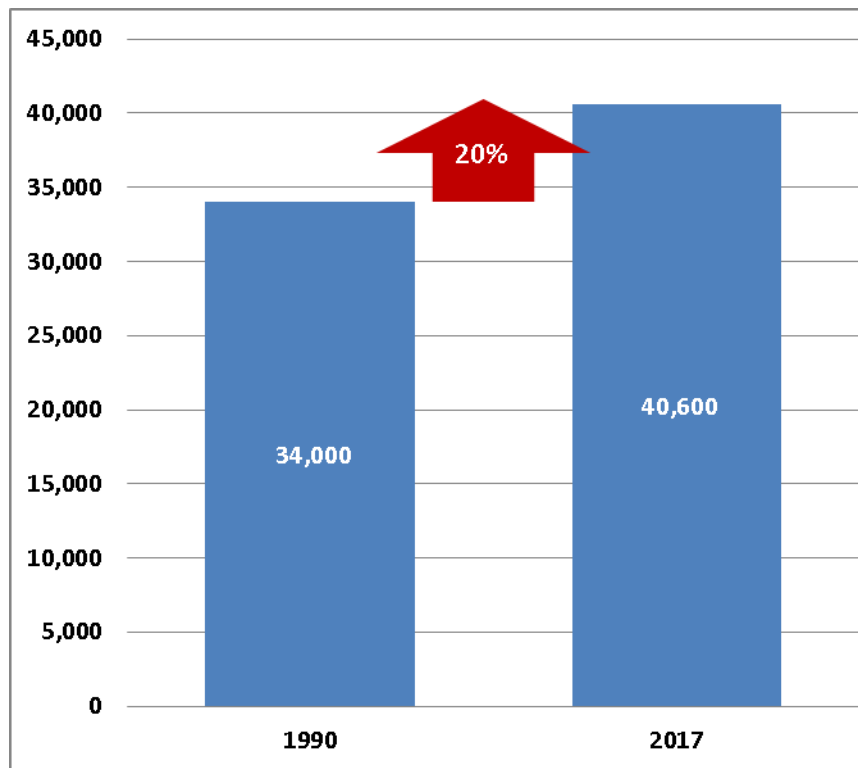


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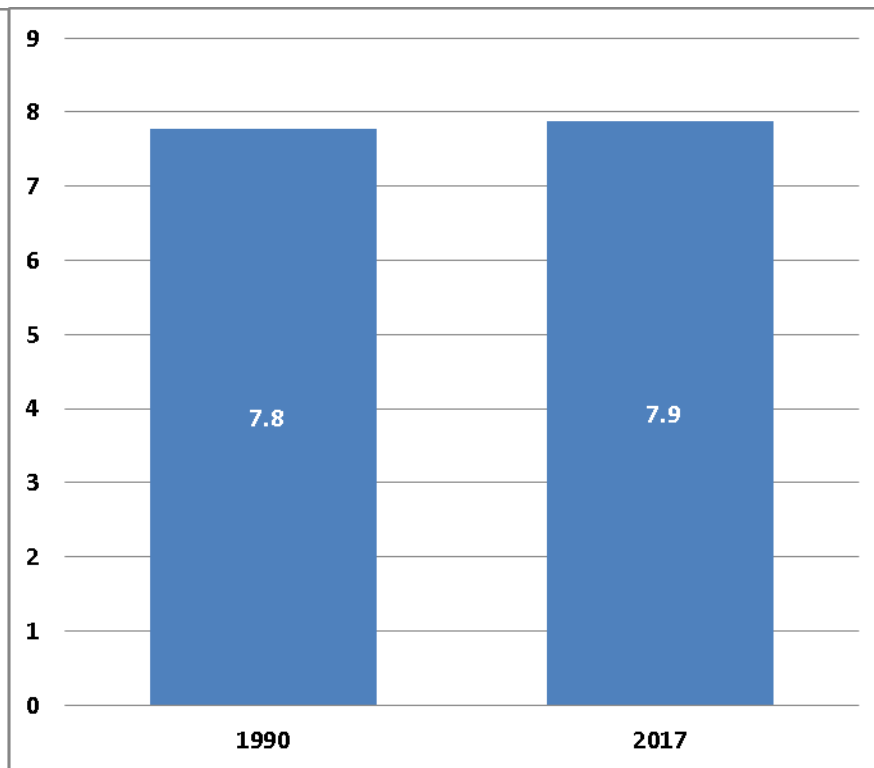
Residential Emissions Trends

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**Residential Emissions Trend
(MTCO₂e/yr)**



**Per-Capita Residential Trend
(MTCO₂e/yr)**

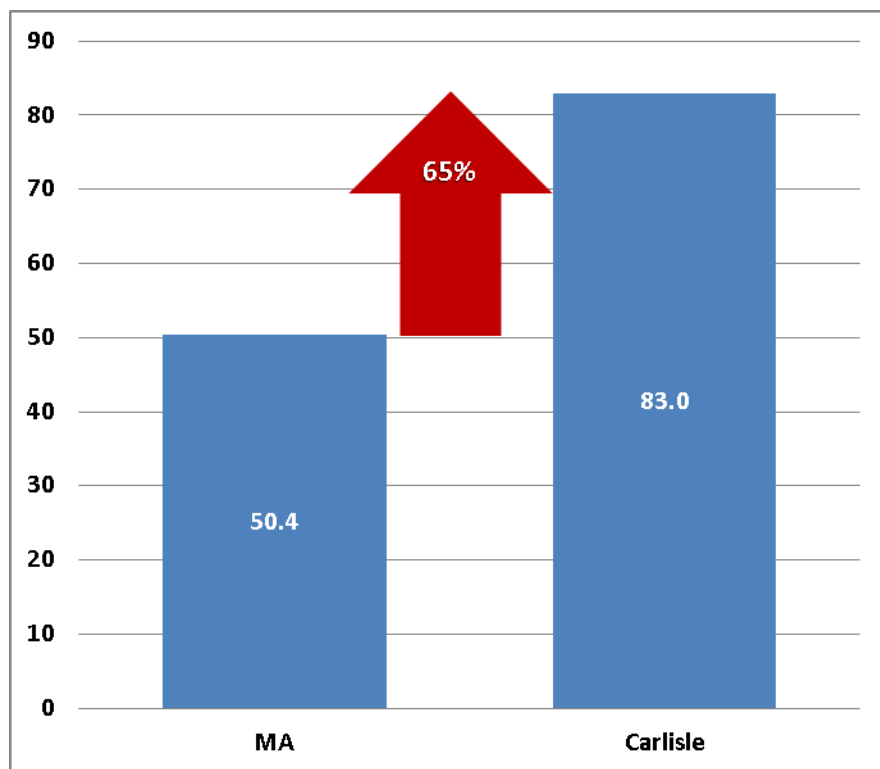


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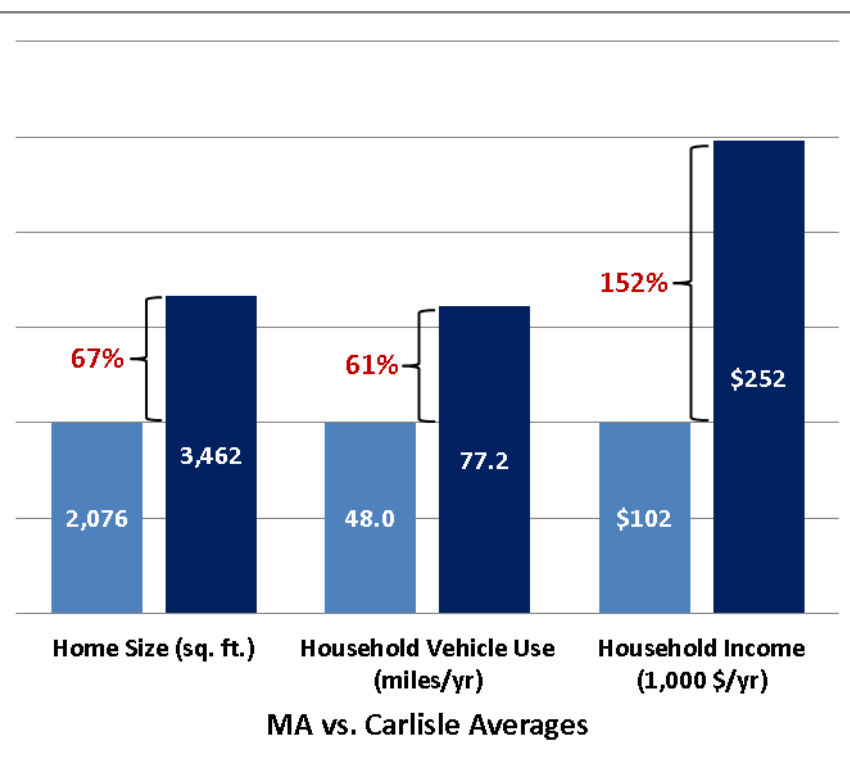
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Residential Emissions Comparisons

Per-Household Direct and Indirect Emissions (MTCO₂e/yr)



Other Metrics



PRELIMINARY DATA—DO NOT CITE

Options for Sustainability Goals

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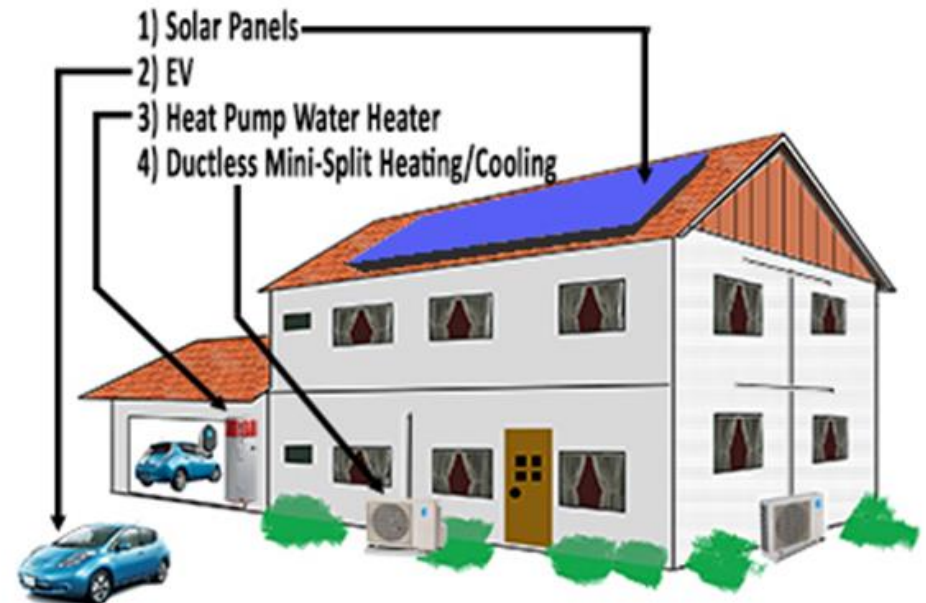
Option 1	Option 2	Option 3
<i>Align with MA Global Warming Solutions Act of 2008</i>	<i>Align with Intergovernmental Panel on Climate Change (2018)</i>	<i>No quantified emissions goals</i>
<ul style="list-style-type: none"> • 6% avg. annual reduction • By 2050, 80% town-wide reduction in Green House Gas (GHG) emissions relative to 1990 emissions ^{1, 2} • By 2030, 40% town-wide reduction 	<ul style="list-style-type: none"> • 10% avg. annual reduction • By 2050, 95% town-wide reduction in GHG emissions relative to 2017 ^{1, 3} • By 2030, 65% town-wide reduction 	

- 1) “Town-wide emissions” include residential, commercial, municipal, and agricultural emissions from both transportation and the built environment.
- 2) Consistent with the year-2050 goal of the MA Global Warming Solutions Act of 2008.
- 3) Per IPCC SR1.5, October 8, 2018, limiting warming to 1.5°C implies reaching net-zero emissions around 2050.

Overall Approach to Achieving Goals

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- **Key Approaches:**
 - *Improve energy efficiency*
 - *Electrify*
 - *Shift to renewable electricity*
- Other Possible Approaches:
 - Biomass heating systems
 - Energy conservation
 - Reforestation and forest preservation
 - Improved agricultural practices



Municipal Approaches to Achieving Goals

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- ***Place sustainability front and center in the municipality***
 - Factor long-term energy costs and value of carbon into plans and decisions
 - Empower department heads to achieve sustainability
- Enhance Community Choice Aggregation & expand municipal solar projects
- Leverage policy avenues:
 - All new homes and buildings zero net energy or “Zero Energy Ready”? ¹
 - Sustainability review of major home / building renovations?
 - Moratorium on natural-gas expansion?
 - Energy ratings / labels for all homes and buildings?
 - Redistribution of local taxes to approximate a carbon tax?
- Develop infrastructure to support electric vehicles, bicycles, and pedestrians
- Support community education and events / programs



1) “Zero Energy Ready Home” is the U.S. Department of Energy brand for high-performance homes that are “solar ready.” See details at: <https://www.energy.gov/eere/buildings/zero-energy-ready-home>

Approach to Residential / Commercial / Institutional

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- Develop energy plans for each home / building
- Residential Example:
 - Develop generic plans for each housing type/vintage (three types)
 - Customize plan for each residence through home energy assessments
 - Implement plans, as owners are able
 - Transfer plans when ownership changes

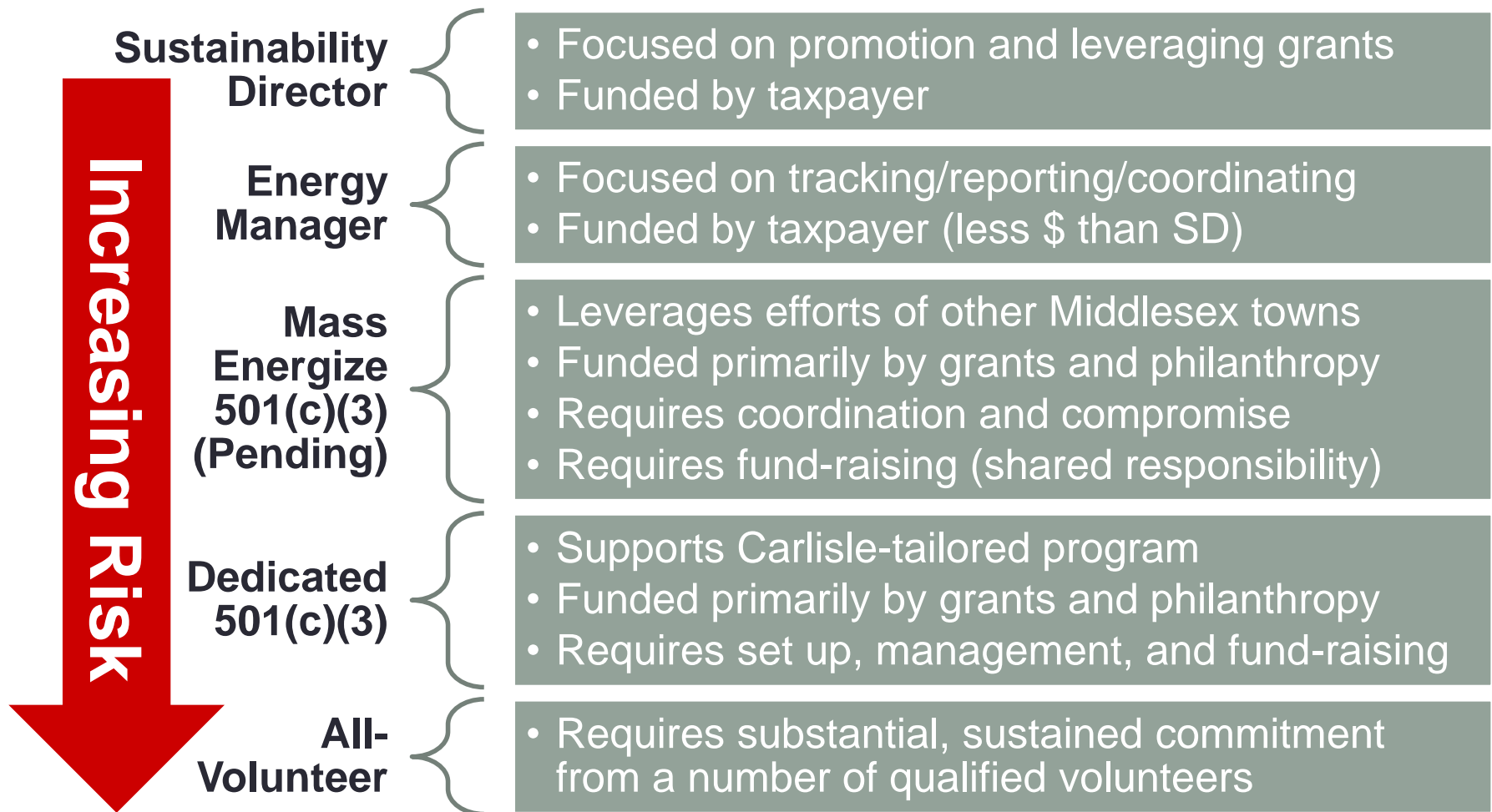


Approach to Agricultural **DRAFT**

- Develop energy plans for each agricultural enterprise
- Example measures:
 - Electrification and energy efficiency
 - No-till agricultural practices
 - Perennial crops / crops with woody biomass
 - Anaerobic digesters to generate biofuels



Management Options **DRAFT**





Resource Requirements **DRAFT**

Management Option	Estimated Program Management Cost (\$/yr) ¹
Sustainability Director	<ul style="list-style-type: none"> Salary: \$150K (fully loaded) Other Staff: \$50K (fully loaded) Expenses: \$25K Total: \$225K
Energy Manager	<ul style="list-style-type: none"> Salary: \$100K (fully loaded) Other Staff: \$50K (fully loaded) Expenses: \$25K Total: \$175K
Mass Energize 501(c)(3)	<ul style="list-style-type: none"> Other Staff: \$50K (fully loaded) Expenses: \$25K Total: \$75K
Dedicated 501(c)(3)	<ul style="list-style-type: none"> Other Staff: \$50K (fully loaded) Expenses: \$25K Total: \$75K
All-Volunteer	<ul style="list-style-type: none"> Other Staff: \$50K (fully loaded) Expenses: \$25K Total: \$75K

Increasing Risk

1) Goal Option 2 implies more aggressive policy and regulatory measures



Resource Requirements **DRAFT**

If we are successful, energy-cost savings may help offset program management costs. ¹

Example Residential Measure	Potential Savings (\$/year) ²
Weatherize Homes	Up to \$1.2 million
Install Heat Pumps for Space Heating	Up to \$1.0 million
Install Heat-Pump Water Heaters	Up to \$0.3 million
Total Annual Benefit (Residential Only)	Up to \$2.5 million

- 1) Residents, businesses, and organizations will also incur the costs of the measures adopted
- 2) Key assumptions for upper end of range:
 - All Carlisle homes achieve 30% reduction in home heating loads through weatherization
 - All homes not heated with natural gas switch to heat pumps (60% air-source heat pumps, 40% ground-source heat pumps)
 - All homes not heated with natural gas install heat-pump water heaters
 - Savings based on current fuel and electricity prices, and current housing stock

Next Steps

DRAFT

- Assist Master Plan Steering Committee with soliciting community input
- Refine estimates of Carlisle's current and past energy consumption and GHG emissions
- Based on community input:
 - Refine goals
 - Further develop conceptual pathway
 - Work with Master Plan Steering Committee to document in proposed Master Plan



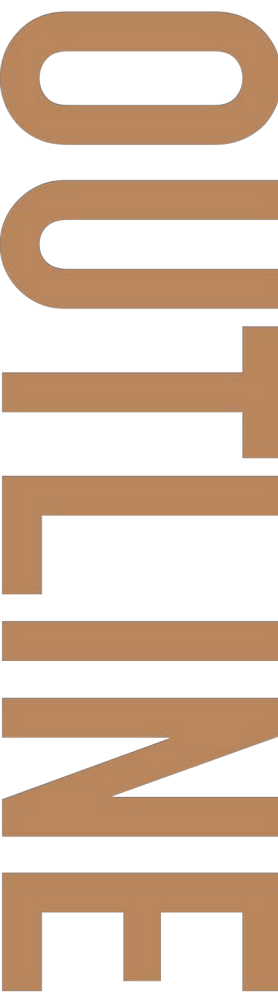


Carlisle Master Plan ETF Report

February 6th, 2019
Master Plan Steering Committee

Outline: Master Plan Updates

1. Master Plan Outcomes
2. Process Vision Statement & Purpose of the Master Plan
3. Master Plan Committees
4. Master Plan Process Guiding Principles
5. Community Interests/Recurring Themes
6. Proposed Master Plan Work Plan & Schedule
7. Fee Estimate Analysis & Recommendations (Including Comparable Town Analysis)
8. Back up work sheets



Broad Integration of Master Plan Initiatives

“Current boards and committees have identified goals and actions for the coming year **based on the final Plan** – e.g., the Select Board has appointed two committees that will focus on the 2 **Cultural Districts** and the Planning Board is considering major revisions to special permit **housing** development options found in the Zoning Bylaw. Additionally, the Town Manager is asking town staff to incorporate recommended actions in Department goals.”

Marcia Rasmussen,
Planning Director, Concord

<https://concordma.gov/DocumentCenter/View/15250/Final-Envision-Concord-Plan-7-30-18-Full-Version-79MB>



Basis for Zoning Amendments & Other Influences

“We have made a lot of **zoning** changes, including upgrading the Industrial and Business zoning, and are working on potential changes to some aspects of **housing** zoning. The analysis of housing trends and needs has probably influenced the Board’s attitudes to what type of development it encourages to sites where there are choices. We contribute our thoughts to things like **Ped & Bike** plan, Strategic housing study, **Senior Needs** survey, **referencing the Plan.**”

Catherine Perry
Assistant Planner, Bedford

https://www.bedfordma.gov/sites/bedfordma/files/file/file/comprehensive_plan_12_10_2013_1.pc



THE BEDFORD WE WANT:
SHAPING OUR FUTURE
COMPREHENSIVE PLAN

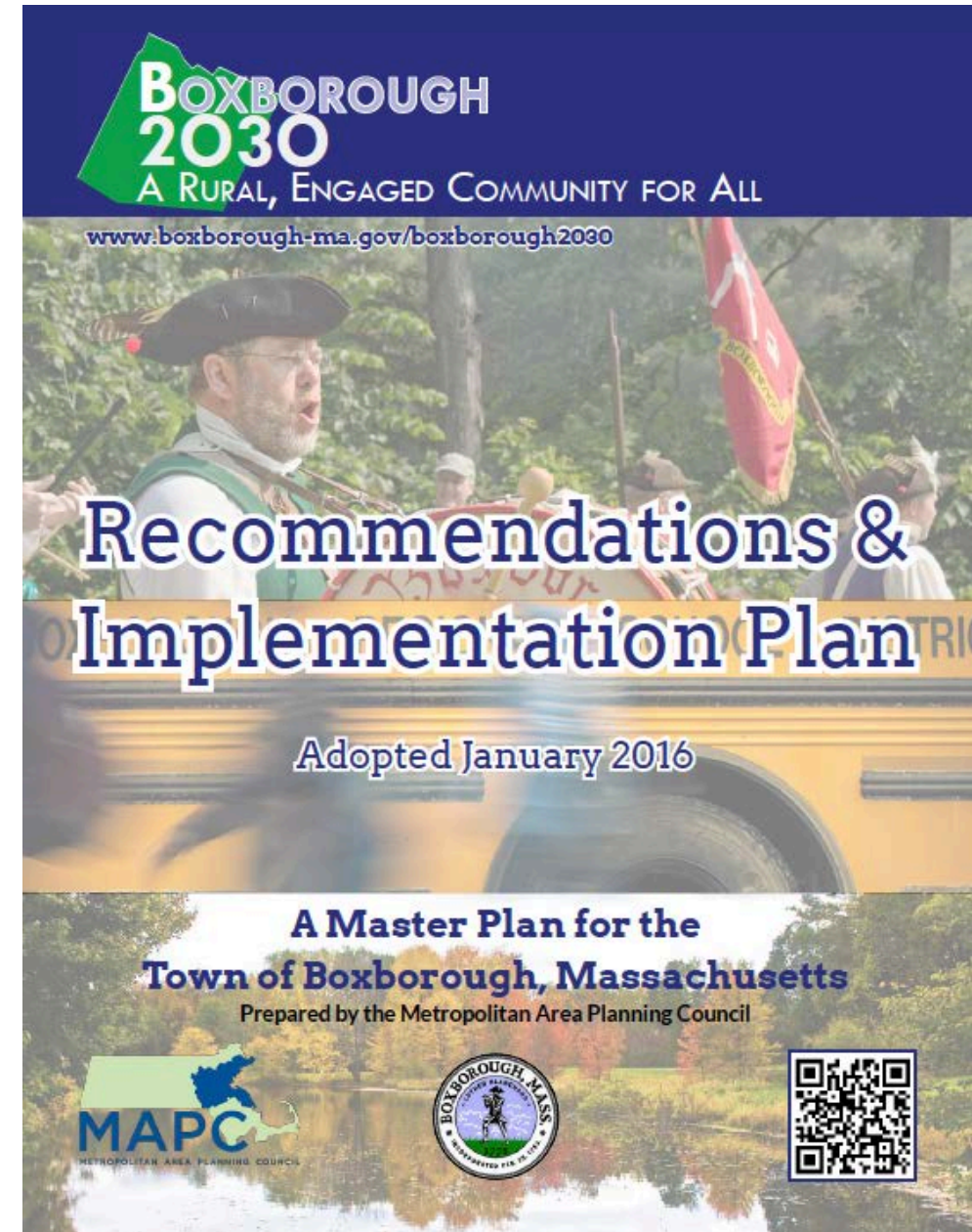
Bedford Planning Board
December 2013

Commitment from Community Leaders

“Our Select Board, Planning Board, **Economic Development** Committee, **Water** Resource Committee, **Agricultural** Commission, and other Town Boards, Committees, and Commissions have really embraced the Master Plan and do their best to adhere to it. The Master Plan Implementation Committee holds the other Town boards, committees, and commissions **accountable for the action items [that] they are assigned, in the Master Plan.**”

Adam Duchesneau,
AICP, Town Planner, Boxborough

<http://www.boxborough-ma.gov/boxborough2030>

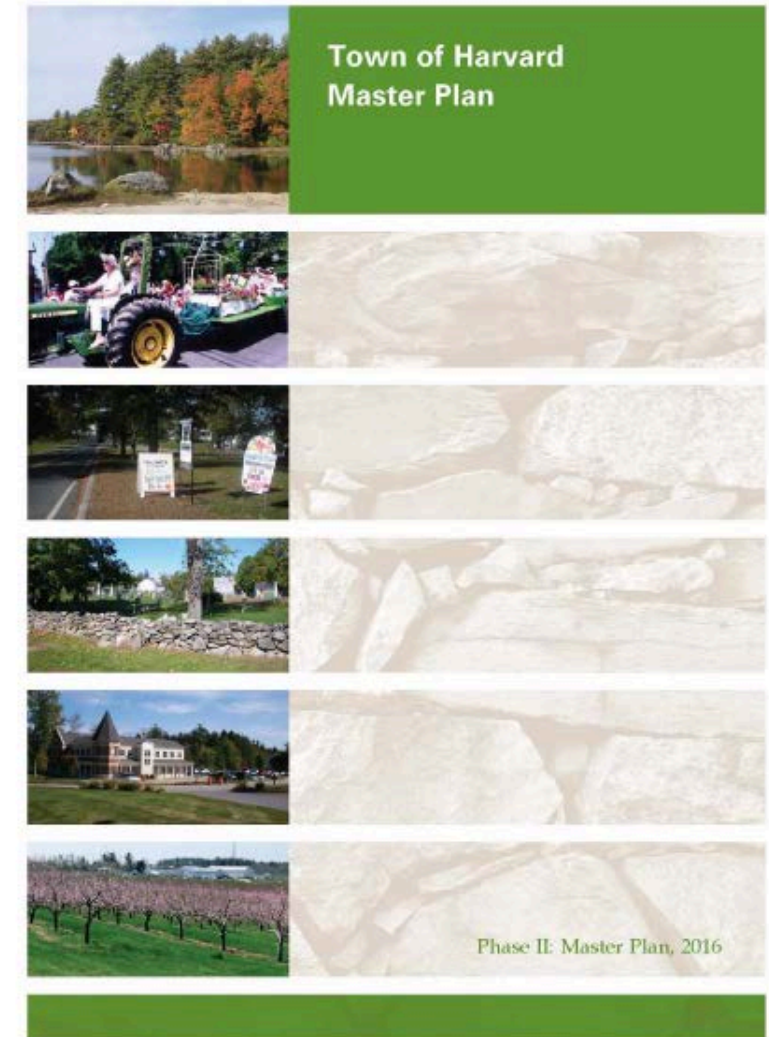


Implementation of Priority Initiatives

“We broke down the Action Plan into specific tasks for various boards and departments to complete. After the first year, we tracked the items that had been completed or were being actively worked on, and put it [the list] up on the web. The intent is to update this [list] annually and send reminders to the departments to urge implementation. In addition, every year the Planning Board conducts a retreat where it identifies its objectives for the next fiscal year. **Implementing the MP plays a prominent role, with the Board deciding which tasks to take on for the coming year. I would say it completes 2 or 3 of its assigned Action Plan tasks each year,** most of which are adopted. Some difficult tasks may flow into the next year. The Selectmen are also very active in implementing their tasks. They also prepare an annual list of goals and consider their remaining MP tasks.”

Christopher Ryan,
Town Planner, Harvard

<https://www.harvard.ma.us/master-plan/pages/2016-master-plan>



Vision Statement for Master Plan Process

“Carlisle seeks to develop a comprehensive long-range master plan that addresses both short-term needs and long-term goals for the town. The master plan, developed through a community process, will inform town policy, guide decision makers and inspire members of the community to participate in Carlisle’s ongoing improvement as a sustainable community.”

From MPSC Report to Planning Board, November 2017



Purpose of the Master Plan

- a **shared vision** that is developed through an inclusive community process
- a **road map** (with targets & metrics) for the town to prioritize future community needs and measure progress towards meeting these goals
- an **integrated approach** that takes input and builds consensus among interested stakeholders
- a **comprehensive** action plan that addresses both short-term needs and long-term goals

Importance of the Master Plan

- Creates shared goals and priorities to align community needs and to help coordinate efforts of **boards and committees**
- Supports **Board of Selectmen, FinCom & School Committee** efforts to plan for expenditures over multiple years and prioritize investments
- Creates a **citizens** forum to discuss and explore new ideas with town-wide participation

Master Plan Committee Structure

Master Plan Steering Committee (MPSC) (7 members)

- Develop master plan process, work plan, schedule and fee estimate
- Make recommendations on budget requirements
- Manage RFP process for hiring and procuring a planning consultant
- Coordinate and manage master plan process and planning consultant
- Coordinate Master Plan Advisory Committee Formation
- Report to Planning Board, Board of Selectmen, and FinCom

Master Plan Advisory Committee (MPAC) (40 members)

- Participate in regular master plan meetings (every 2-3 months)
- Provide input to MPSC and consultants on community interests and concerns
- Act as a resource to community members on master plan content and process

Guiding Principles for the Master Plan

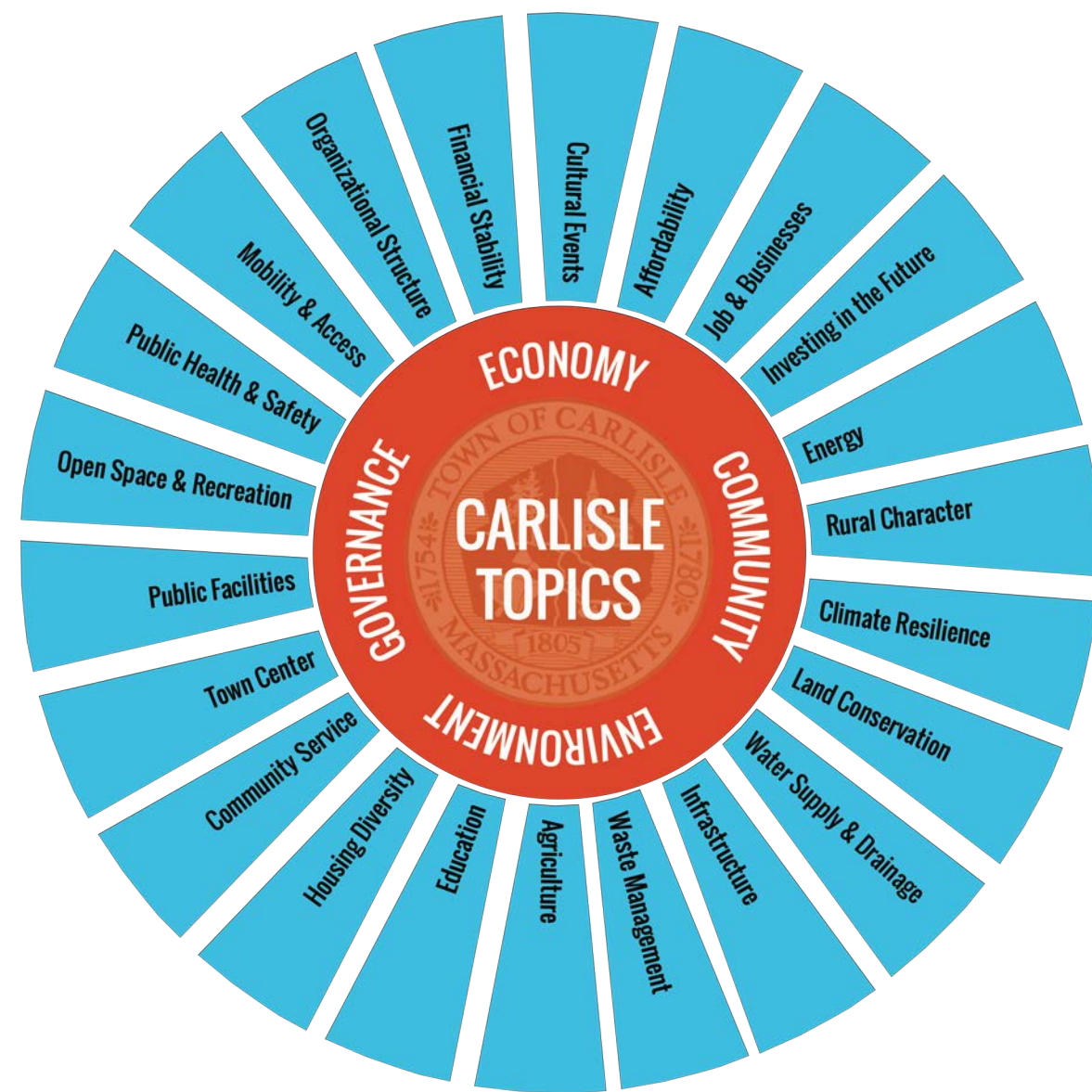
Action Oriented Approach: The master plan will identify clear policy direction and priority projects, outline roles and responsibilities, and define approaches to funding and implementation with the expressed goal of timely implementation. The plan will establish a phasing strategy that embraces master plan goals yet is feasible and can be implemented within a reasonable time frame.

Community Engagement: The master plan will undertake a robust community engagement process that reaches and engages with all of Carlisle's constituents. The goal of the master planning process is to raise awareness among town residents, identify key players and leadership, and build support across interest groups. The engagement process will include: interviews with key stakeholders and town boards and committees, focus group meetings, social media and a web site, public workshops and surveys.

Measure Success: The master plan process will embrace a performance-based approach that establishes targets and a dashboard for measuring outcomes. A data-driven planning method will help Carlisle's residents understand the tradeoffs and benefits of decisions as we work to balance our goals. The master plan will help Carlisle prioritize actions and measure our progress towards achieving the town's goals.

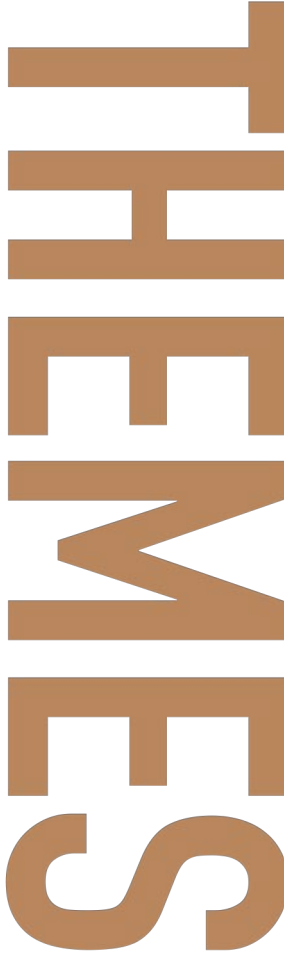
Guiding Principles for the Master Plan (cont'd)

Integrated Planning: The master plan must incorporate the elements required by the State as outlined in M.G.L. Ch. 41, s. 81-D. These elements include: Goals and Policies, Land Use, Housing, Economic Development, Natural and Cultural Resources, Open Space and Recreation, Services and Facilities, Circulation and Transportation, and Implementation. There are a number of additional topics that are not included in the 81-D law that will be incorporated in the Carlisle Master Plan consistent with current planning practices in the Commonwealth. To this end the MPSC has developed an “Integrated Planning Framework” that encompasses all of the topics relevant to creating a sustainable future for the Town of Carlisle. The attached diagram is an illustration of the Carlisle Integrated Planning Framework.



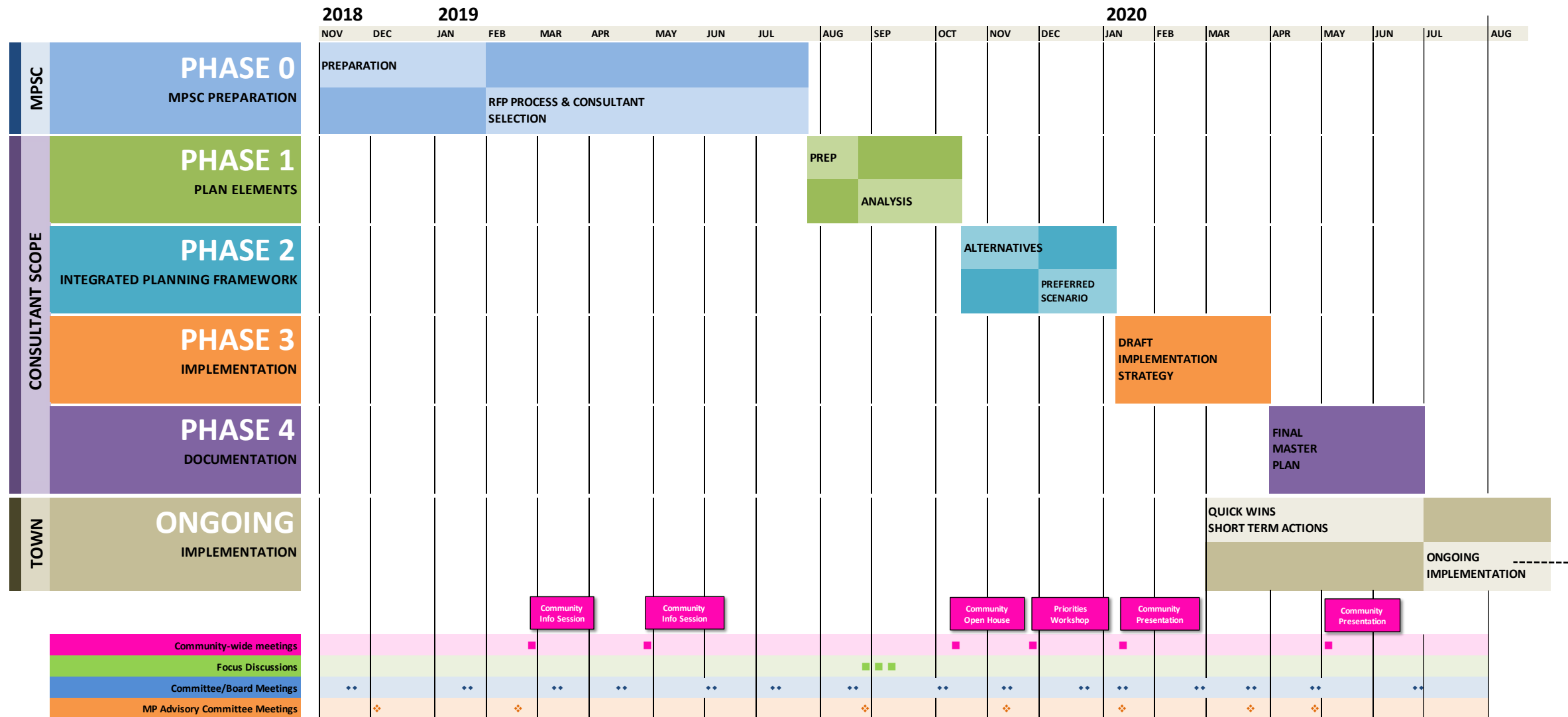
Community Interest/ Recurring Themes

- **Agricultural Uses:** Maintaining Carlisle's Rural Character
- **Conservation & Recreation:** Carlisle's Identity
- **Community Center:** Providing a New Facility for the Community
- **Creating Community:** Meeting the Social Needs of Carlisle Residents
- **Housing:** Diversity & Affordability that meets Carlisle's needs
- **Revenue Generating Opportunities:** Creative Solutions
- **Sustainability:** Economy, Environment & Community
- **Town Center:** Unlocking Potential
- **Transportation:** Creating More Options
- **Walkability:** Connecting Carlisle Neighborhoods



Overall Master Plan Process

- Phase 0 – MPSC Preparation
- Phases 1 - 4 – Planning Consultant-led MP process
- Ongoing – Implementation



Fee Estimate Overview

- Based on MPSC “Mock Up” of Work Plan Proposal & Fee Estimate
- Review of Comparable Town RFP’s/Plans/Fee Analysis
- Review by Planning Experts

PHASE 1: PLAN ELEMENTS	
1 Preparation	<ul style="list-style-type: none"> a GIS Mapping b Background Review
2 Analysis/Framing of Plan Elements	<ul style="list-style-type: none"> a Current projects & plans b Needs & Issues c Barriers & Challenges d Opportunities f PPT Presentation
3 Community Engagement	<ul style="list-style-type: none"> 1 Focus Discussions 2 Committee/Board Meetings 3 Community-wide meetings 4 MP Advisory Committee Meetings
PHASE 2: INTEGRATED PLAN FRAMEWORK	
1 Alternative Scenarios	<ul style="list-style-type: none"> a Alternative Scenario Exploration b Evaluate Scenarios
2 Preferred Scenario - Priorities	<ul style="list-style-type: none"> a Refine Preferred Scenario b Plan Priorities and Phasing
3 Community Engagement	<ul style="list-style-type: none"> a Community-wide meetings b Committee/Board Meetings c MP Advisory Committee Meetings
PHASE 3: IMPLEMENTATION	
1 Draft Implementation Strategy	<ul style="list-style-type: none"> a Long Term Plan b 5-Year Action Plan c Funding, Governance, Technical Studies
2 Community Engagement	<ul style="list-style-type: none"> a Committee/Board Meetings c MP Advisory Committee Meetings
PHASE 4: DOCUMENTATION	
1 Final Master Plan	<ul style="list-style-type: none"> a Presentation b Draft Report c Final Report
2 Community Engagement	<ul style="list-style-type: none"> a Community-wide Meeting b Committee/Board Meetings c MP Advisory Committee Meetings

Mock Up of Fee Estimate based on Work Plan

- Total estimated minimal fee of \$122,700 including \$116,850 for labor and \$5,850 for expenses (based on work plan & anticipated staffing)
- Anticipated expertise: Planning, Civil Engineering & Economic Strategy
- Total of over 1,000 hours of work anticipated at a blended hourly rate of \$109/hour

FEE ESTIMATE BY EXPERTISE

PLANNING (PRIME)	\$ 90,050.00
CIVIL ENGINEERING	\$ 12,900.00
ECONOMIC STRATEGY	\$ 13,900.00
TOTAL ESTIMATE FEE	\$ 116,850.00

FEE ESTIMATE BY PHASE

PHASE 1 PLAN ELEMENTS	\$ 39,000.00
PHASE 2 INTEGRATED PLANNING FRAMEWORK	\$ 30,200.00
PHASE 3 IMPLEMENTATION	\$ 20,700.00
PHASE 4 DOCUMENTATION	\$ 26,950.00
TOTAL ESTIMATE FEE	\$ 116,850.00

SUMMARY

TOTAL HOURS	1,072
BLENDED HOURLY RATE	\$ 109.00

Summary of Comparable Town Analysis

- Reliable data from four comparable towns: Concord, Boxborough, Bedford, and Harvard
- Consultant and staff time included
- Master plan costs range from \$143,000 to \$277,000

Town	RFP Date	Scope of RFP	Consultant Budget	Staff Time Budget Equivalency	MP Cost	Total MP Cost	Contract Time
Concord	12/15/16	Comprehensive Long Range Plan	\$ 120,000	Planning Director	\$ 59,089	\$ 277,133	16 months
			\$ 54,000	Town Planner	\$ 44,044		
				Former Town Clerk (Volunteer)	\$ -		
				2 Fin Com Members - survey	\$ -		
				MPSC Co-chairs	\$ -		
Boxborough	9/4/14	Master Plan Update	\$ 75,000	Town Planner	\$ 43,125	\$ 143,125	12 months
			\$ 25,000	6 employees to run meetings			
Bedford	4/27/12	Master Plan - Consultant Services	\$ 40,800	Planning Director	\$ 27,600	\$ 235,150	12 months
				Assistant Planner	\$ 51,750		
				Admin Assistant	\$ 69,000		
				Intern	\$ 28,750		
				GIS Analyst	\$ 17,250		
Harvard	8/29/11	Master Plan Phase 1 - Town Vision & Goals	\$ 35,000	Town Staff	\$ 1,869	\$ 210,181	18 Months
	7/22/13	Master Plan Phase 2 - Scope & Action Planning	\$ 100,000	Consulting Town Planner	\$ 73,313		
Acton		Master Plan Phase 1 - Community Outreach	None Referenced			???	12 months ish
	8/6/08	Phase 2 - Master Plan	\$ 140,000				
AVERAGE						\$ 216,340	

Fee Estimate Recommendations

- **\$122,700 - Based on MPSC Mock Up Work Plan & Fee**
- **\$143,000 to \$277,000 - Based on Comparable Plans**

**MPSC RECOMMENDATION:
\$135,000 budget**

Feedback from Comparable Towns

“You do need to have a consultant which is really willing to roll up their sleeves. I do not see a way a community like Boxborough could have done an update like we did using only Town staff and volunteers.”

Adam Duchesneau,
AICP, Town Planner, Boxborough

“We contribute our thoughts to things like Ped & Bike plan, Strategic housing study, Senior Needs survey, referencing the Plan. So I think we are having some influence beyond the Planning Department/Board's direct responsibilities.”

Catherine Perry,
Assistant Planner, Bedford

“Because the outreach during the master plan was so robust, we found recommendations and ideas being implemented before the plan was actually completed.”

Marcia Rasmussen,
Planning Director, Concord

“Implementing the MP plays a prominent role, with the Board deciding which tasks to take on for the coming year. I would say it completes 2 or 3 of its assigned Action Plan tasks each year, most of which are adopted.”

Christopher Ryan,
Town Planner, Harvard

Master Plan Outcomes

- Strategic Road Map for prioritizing and implementing town priorities
- Engagement of community leaders in ongoing town improvements
- Identification of priority projects w/ conceptual budgets & implementation steps
- Geographical Information System (GIS) Database updated
- Basis for comprehensive policy and zoning amendments
- Basis for updating Open Space/Recreation and Housing Production plans



OUTCOMES



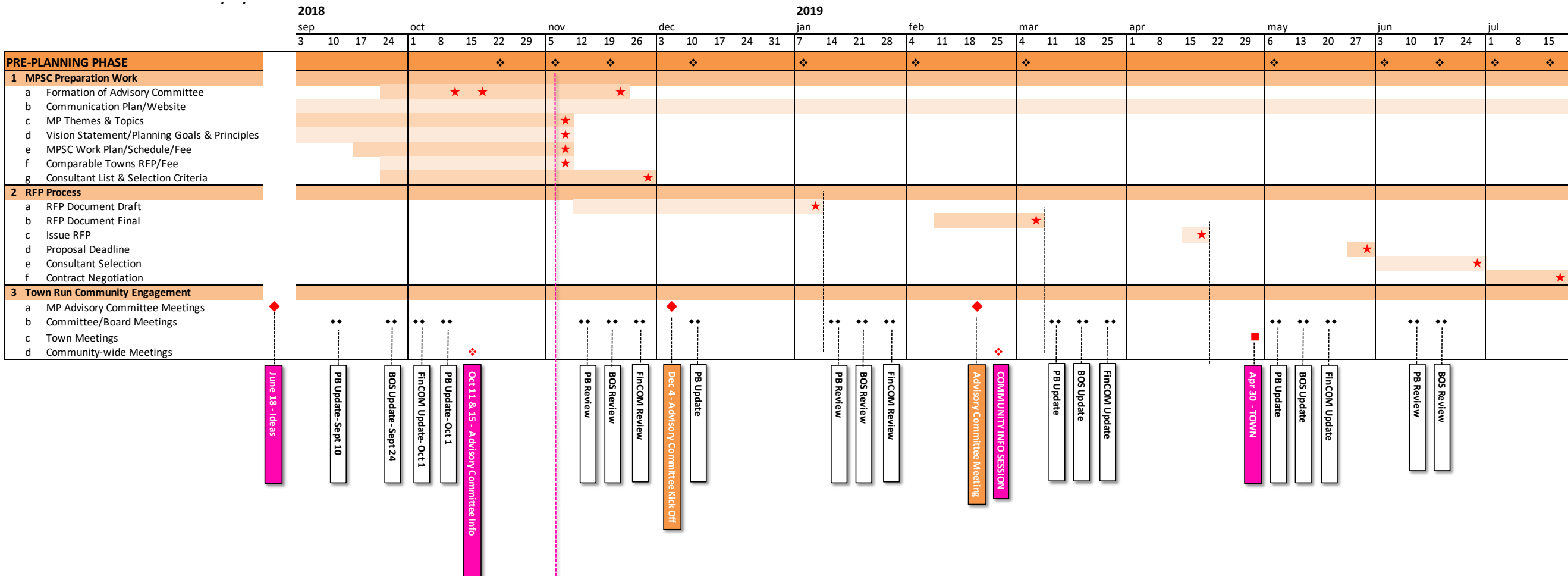
www.carlisleplan.org

Supplemental Materials

BACK UP

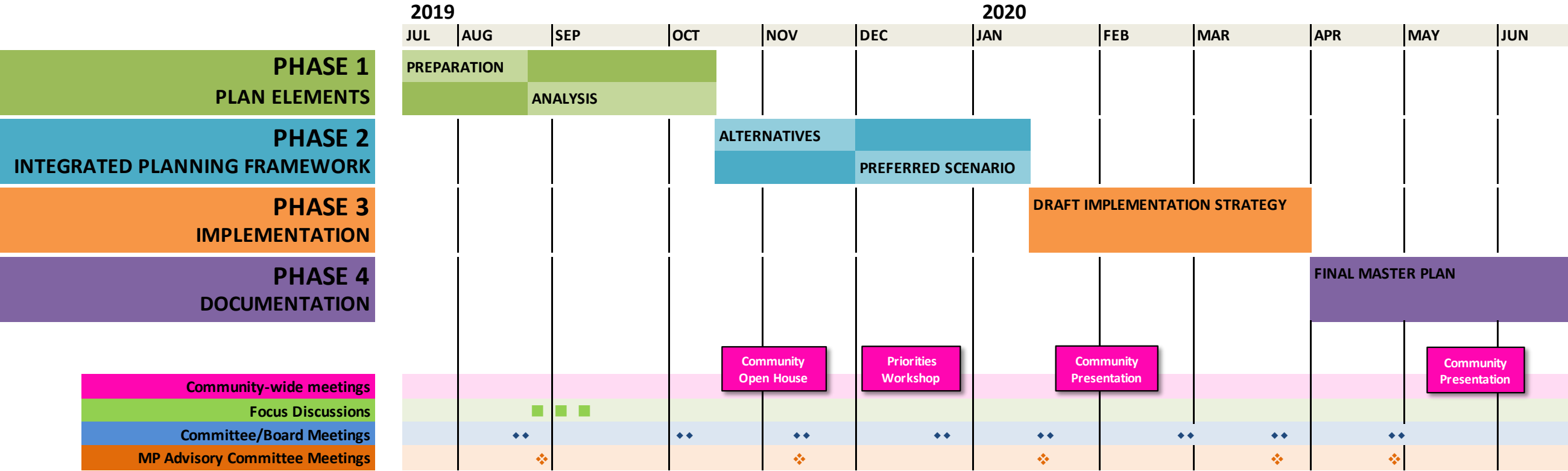
Phase 0: MPSC Preparation

- Formation & Kick Off Meetings of Advisory Committee
- Preparation of Master Plan Work Plan & RFP
- Regular MPSC Update meetings with Town Boards/Committees



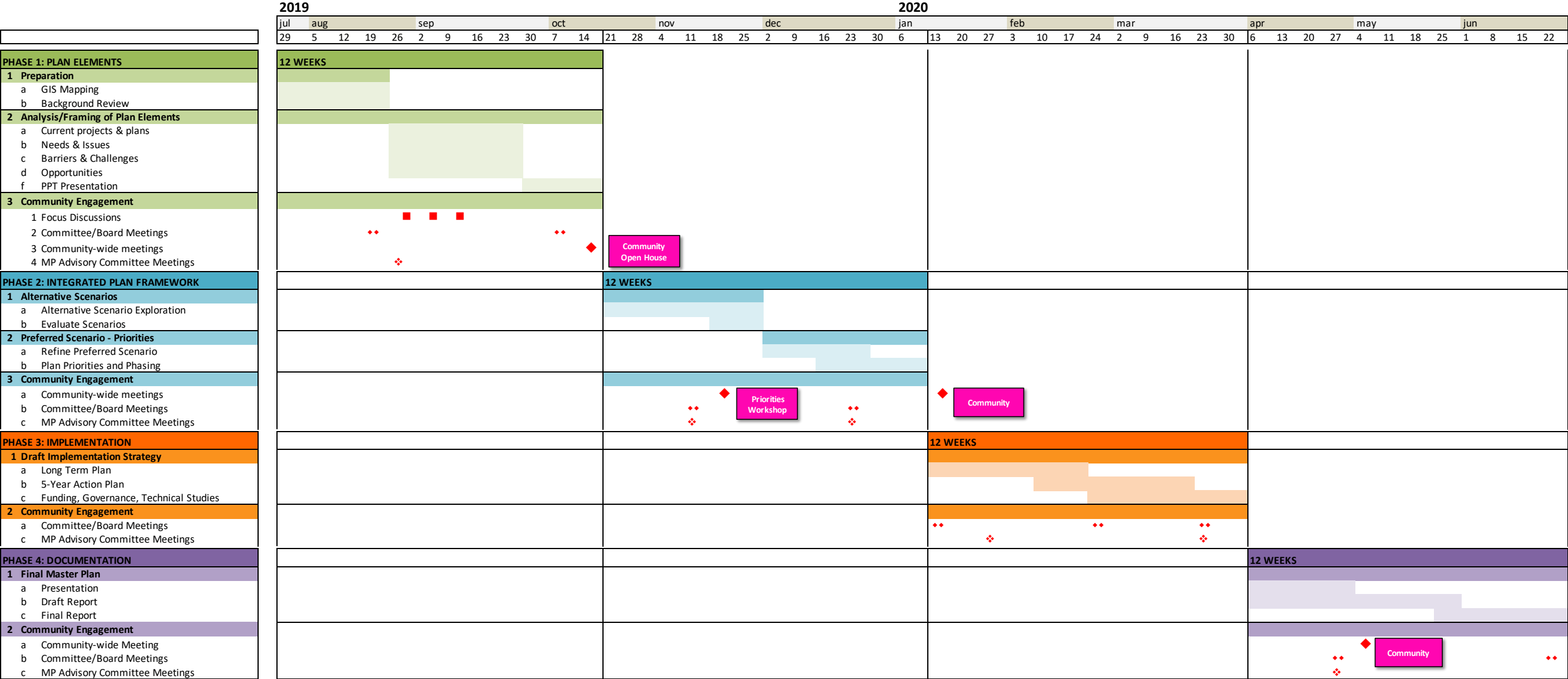
Phases 1 - 4: Consultant Work Plan/Schedule

- Four phases in 12 months
- Four town-wide community meetings, Five MPAC meetings
- Regular MPSC Update meetings with Town Boards



Phase 1 - 4: Consultant-led Master Plan Work Plan

BACK UP



Phase 1 - 4: Consultant Fee Estimate

Hourly rates		175	100	75	100	150	75	200	75		
		Planning Firm (Prime)				Civil		Economic			
		PIC	PM	Staff	GIS	PM	Staff	PM	Staff		
PHASE 1: PLAN ELEMENTS											
1 Preparation											
a	GIS Mapping	0	4	4	24						
b	Background Review	4	8	8	0						
2 Analysis/Framing of Plan Elements											
a	Current projects & plans	2	8	8	8	4					
b	Needs & Issues	4	8	0	0		4	4			
c	Barriers & Challenges	4	8	0	0	8	8	4			
d	Opportunities	4	8	0	0	8		8		4	
f	PPT Presentation	2	16	32	32		8			4	
3 Community Engagement											
1	Focus Discussions	12	12	0	0	8	4	4		4	
2	Committee/Board Meetings	4	4	4	0						
3	Community-wide meetings	4	4	0	0	2		2			
4	MP Advisory Committee Meetings	4	4	0	0	2		2			
		7,700	8,400	4,200	6,400	4,800	1,800	4,800	900	PHASE 1	
											39,000
PHASE 2: INTEGRATED PLAN FRAMEWORK											
1 Alternative Scenarios											
a	Alternative Scenario Exploration	8	24	40	16	8	8	8		8	
b	Evaluate Scenarios	8	8	0	0	2	8	2			
2 Preferred Scenario - Priorities											
a	Refine Preferred Scenario	8	24	24	8	4	16				
b	Plan Priorities and Phasing	8	8	4	0			4		8	
3 Community Engagement											
a	Community-wide meetings	4	4	0	0						
b	Committee/Board Meetings	0	0	0	0						
c	MP Advisory Committee Meetings	4	4	0	0						
		7,000	7,200	5,100	2,400	2,100	2,400	2,800	1,200	PHASE 2	
											30,200
PHASE 3: IMPLEMENTATION											
1 Draft Implementation Strategy											
a	Long Term Plan	16	16	24	8						
b	5-Year Action Plan	8	16	16	0	4	0	8		8	
c	Funding, Governance, Technical Studies	8	16	8	0	4	0	4		8	
2 Community Engagement											
a	Committee/Board Meetings	0	0	0	0						
c	MP Advisory Committee Meetings	4	4	0	0						
		6,300	5,200	3,600	800	1,200	-	2,400	1,200	PHASE 3	
											20,700
PHASE 4: DOCUMENTATION											
1 Final Master Plan											
a	Presentation	4	24	40	8		4	0		4	
b	Draft Report	16	40	60	16		4	0		4	
c	Final Report	4	16	16	8						
2 Community Engagement											
a	Community-wide Meeting	2	2	0	0						
b	Committee/Board Meetings	2	2	0	0						
c	MP Advisory Committee Meetings	2	2	0	0						
		5,250	8,600	8,700	3,200	-	600	-	600	PHASE 4	
											26,950
		26,250	29,400	21,600	12,800	8,100	4,800	10,000	3,900	TOTAL	
											116,850

BACK UP

Research on Comparable Towns

- Research on 12 comparable towns – narrowed to five

BACK UP

Overview of Master Plan Data and Costs for Comparable Towns																							
Prepared by MPSC 11-23-2018																							
Town	RFP Date	Scope of RFP	Consultant Oversight	Consultant Budget		Staff Time Budget Equivaler	Years	%Time	Salary	Benefits	Total Cost	MP Cost	Total MP Cos	Contract Time	Detailed Scope								Comments
Concord	12/15/16	Comprehensive Long Range Plan	CLRPC	Original Budget	\$ 120,000	Planning Director	2	0.2	\$ 128,455	\$ 19,268	\$ 147,723	\$ 59,089	\$ 277,133	16 months	Data Gathering	Analysis	Output The Plan	Communication & Outreach					CLRPC & Town boards responsible for gathering data and info
				Additional Allocation	\$ 54,000	Town Planner	2	0.2	\$ 95,747	\$ 14,362	\$ 110,109	\$ 44,044											
						Former Town Clerk (Volunteer)	2 weeks		volunteer			\$ -											
						2 Fin Com Members - survey	8 weeks		volunteer			\$ -											
						MPSC Co-chairs	100 weeks	500	volunteer			\$ -											
Boxborough	9/4/14	Master Plan Update	Planning Director	Town Budget	\$ 75,000	Town Planner	1	0.5	\$ 75,000	\$ 11,250	\$ 86,250	\$ 43,125	\$ 143,125	12 months	Develop Website	Hold Project meeting	Develop Plan Sections	Develop Maps & Data	Magazine Style Executive Summary				coordinates with town planner; also RFP seems written by MAPC for MAPC not really a RFP. More like a proposal.
				District Local Technical Assistance (DLTA) through MAPC	\$ 25,000	6 employees to run meetings																	
Bedford	4/27/12	Master Plan - Consultant Services	Planning Director	Consultant Budget/Expenses	\$ 40,800	Planning Director	1	0.2	\$ 120,000	\$ 18,000	\$ 138,000	\$ 27,600	\$ 235,150	12 months	Data Collection & Analysis	Public Participation & Workshops	Department Informational Interviews	Mapping	Public Information	Project Management	Production & Printing		Spence RFP budget referenced as "fixed upset limit" not sure what that means. Value seems low
						Assistant Planner	1	0.6	\$ 75,000	\$ 11,250	\$ 86,250	\$ 51,750											
						Admin Assistant	1	1	\$ 60,000	\$ 9,000	\$ 69,000	\$ 69,000											
						Intern	1	1	\$ 25,000	\$ 3,750	\$ 28,750	\$ 28,750											
						GIS Analyst	1	0.2	\$ 75,000	\$ 11,250	\$ 86,250	\$ 17,250											
Harvard	8/29/11	Master Plan Phase 1 - Town Vision & Goals	MPSC Chair		\$ 35,000	Town Staff	0.25	0.1	\$ 65,000	\$ 9,750	\$ 74,750	\$ 1,869	\$ 210,181		Hold a Minimum of 2 town wide forums	Design & Conduct Surveys	Supply Web Content	Develop Final Report	Assist in Drafting Phase 2 RFP and Estimate Cost for Phase 2				
	7/22/13	Master Plan Phase 2 - Scope & Action Planning	MPSC Chair		\$ 100,000	Consulting Town Planner	1.25	0.6	\$ 85,000	\$ 12,750	\$ 97,750	\$ 73,313		18 Months	Analyses the Governance/Non-Governance of Deveres	Analysis Land Use	Identify & Analyze housing needs	Analyze opportunities for Economic Development	Identify policies & strategies for protection & Management of Natural Resources	Review and Analyze strategic planning areas (town center, Ayer Road Commercial District	Review Town energy options, use, and needs	Develop Plan & outline strategies for implementation	Town Funded role of Town Planner for one Year to work on Master Plan Related tasks
Acton		Master Plan Phase 1 - Community Outreach	Town Manager		None Referenced								???		No Set or Suggested Scope of Services	Town Looks to engage its citizens							
	8/6/08	Phase 2 - Master Plan	Town Manager		\$ 140,000									12 months ish	Acton's housing needs in the context of the regional housing needs	Review of regional open spaces and how Acton's open lands fit in	regional economic assessment and an evaluation of Acton's competitive position to attract new business growth	Assess towns facilities and infrastructure and identify necessary changes	Evaluate Towns current form of government and suggest changes	Continue outreach from Phase 1	Final report and path forward including implementation options		